

## *Discovery Meeting Checklist*

### RESOURCES NEEDED: *[CONFIDENTIAL]*

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#### **Personal/Individual:**

- Personal Tax Returns for last 2 years
- Notice of Assessments for last 2 years
- Employee Benefit Statements (*booklets*)
- Personal Insurance Policies
- Mortgage and Loan Statements
- Non-Registered Investment Statements
- Registered Investment Statements (*RRSP, TFSA, RESP etc...*)
- Wills
- Power of Attorney(s)

#### **Business/Company:**

- Organizational Chart
- Financial Statements for Operating Company
- Financial Statements for Holding Company
- Company Owned Insurance Policies
- Shareholder (buy-sell) Agreement(s)
- Company Investment Statements